

**1      Title:            FULLY INTEGRATED SERVICE MANAGER WITH**

**2                            AUTOMATIC FLOW-THROUGH INTERCONNECTION**

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4

## 5 RELATED APPLICATIONS

6 This application claims the benefit of U.S. Provisional Application No.

<sup>7</sup> U.S. Patent Application No. 60/176,571, filed Jan. 18, 2000, entitled "Fully Integrated Service Manager With

8 Automatic Flow-Through Interconnection " and naming David C. Curtis as inventor.

## 9 BACKGROUND OF THE INVENTION

10 Telecommunications service providers are entering the age wherein new service  
11 offerings and technological changes occur on a frequent basis. In order to maintain a  
12 competitive edge, providers need the ability to easily provide proposals that cover a  
13 customer's existing service for voice, data, video and Internet networks in terms of their  
14 own products. Presently the creation of such proposals is a semi-manual system that is  
15 costly and often inaccurate.

16 With the passage of the Telecommunications Act ("the Act") of 1996, the United  
17 States telecommunications industry is in a state of radical change. Among other things,  
18 the Act requires that Incumbent Local Exchange Carriers (ILEC), the regulated entity that  
19 owns and administers an existing access network, provide to any requesting  
20 telecommunications carrier (hereinafter referred to as "Competitive Local Exchange  
21 Carriers" (CLEC), Integrated Communications Provider (ICP), or Competitive Service  
22 Provider (CSP)) nondiscriminatory access to network elements on an unbundled basis  
23 and to allow CLECs, ISPs or CSPs to combine such network elements in order to provide

1 telecommunications service. ILECs also have a duty to provide to CLECs  
2 interconnection with their network for the transmission and routing of telephone  
3 exchange service and exchange access. The interconnection contemplated by the Act  
4 provides nondiscriminatory access or interconnection to such services or information as  
5 are necessary to allow the requesting CLEC to implement local dialing parity, including  
6 nondiscriminatory access to telephone numbers, operator service, directory assistance,  
7 and directory listing, with no unreasonable dialing delays. The provisions of the Act have  
8 demonstrated a need for competing exchange carriers to be interconnected so that  
9 customers can seamlessly receive calls that originate on another carrier's network and  
10 place calls that terminate on another's carrier's network without performing additional  
11 activities, such as dialing extra digits, etc. A CLEC can offer multiple types of services,  
12 including basic POTS, IXC long distance carrier service, ISP Internet Service Provider,  
13 VPN (virtual private network), VoIP (voice over internet), VoDSL (voice over DSL  
14 access), video, etc. Many of the more advanced services require access to broadband  
15 services.

16           Recent adoption of Digital Subscriber Line (DSL) technology allows customer  
17 access to these broadband services over their existing copper wire connection to the  
18 ILEC. With DSL, subscribers only need to purchase (or lease) a comparatively  
19 inexpensive DSL modem and connect it to the existing copper wire connection. Other  
20 advances in broadband data services can be combined with DSL service to provide the  
21 subscriber with additional connectivity options. Virtual Private Networks (VPNs) are also  
22 seeing explosive growth, especially in the remote-office and tele-commuter  
23 environments. VPNs and DSL allow a subscriber to connect to a private corporate

1 network over a public infrastructure securely, while maintaining high bit-rate  
2 transmissions. Subscribers are also beginning to test the waters with Voice Over DSL  
3 (VoDSL) deployments. This technology allows subscribers to run multiple phone and  
4 data connections over a single copper line, using just one customer premise xDSL  
5 modem.

6 The opportunities for CLECs, IXCs, and ISPs (collectively identified from this  
7 point on as Integrated Communications Providers or ICPs) offering these services are  
8 immense. Data transport demands have opened up a whole new set of revenue generating  
9 opportunities for ICPs. However, the growth rate and myriad of convergent offerings  
10 make it difficult for companies to establish themselves in any one market. To be  
11 successful, ICPs need to remain flexible, customer focused, and establish a continual set  
12 of value propositions and competitive advantages within the marketplace.

13 ILECs have developed different methods to allow ICPs to electronically place  
14 orders with the ILEC for wholesale products and services. For example, U.S. Patent  
15 6,104,999 to Gilles et al. and incorporated by reference herein, discloses that LECs use  
16 Internet browser forms, proprietary protocols and electronic data interchange (EDI).

17 In one embodiment, the Gilles patent discloses methods of using EDI for  
18 telecommunication provider retrieval of customer service records and electronic services  
19 ordering. An authorized ICP or reseller utilizes EDI to request from the ILEC the present  
20 services being provided to a particular customer. The ILEC uses EDI to transfer the  
21 customer service record to the ICP. In a separate embodiment, the ICP uses EDI to  
22 electronically order revisions or additions to service.

1        During electronic services ordering, a number of pre-ordering steps are required.

2        For example, if a telephone number, Internet domain name or Internet Protocol (IP)  
3        address is available it is reserved as part of the pre-ordering function. In addition, due  
4        date of initiation of new service is transmitted and either confirmed or revised. Also,  
5        certain validation steps are required, including customer service address.

6              Various uses have been made of electronic access to customer service records  
7        (CSR). For example, U.S. Patent 6,032,132 to Nelson discloses using the CSR to  
8        validate billing between an ICP and an ILEC. Similarly, U.S. Patent 5,416,833 to Harper  
9        et al. and U.S. Patent 5,920,846 to Storch et al. disclose an ILEC using the CSR to  
10       process changes to service provided by the ILEC and to respond to CLEC requested  
11       changes.

12             However, the customer service record (CSR) is also independently useful to ICPs.  
13       As the CSR often identifies both ILEC provided services as well as services of competing  
14       ICPs and resellers, it is convenient for ICPs and resellers to retrieve a customer service  
15       CSR in preparing a sales proposal. Following retrieval, the CSR is interpreted and ICP  
16       competing service offerings are identified. The sales proposal is based upon this analysis  
17       and a final proposal is presented to the customer. Up to now, the CSR has been printed  
18       then manually compared to an ICP's service offerings. This manual process is labor  
19       intensive and prone to errors. As a result, a method of automating the sales proposal  
20       function based on CSR is needed.

21           Once a customer accepts a sales proposal for ICP services, it must be provisioned  
22       and appropriate request for service orders issued to ILECs. Presently these requests are  
23       manually originated. By automating the activation and provisioning process, ICPs will be

1 able to significantly reduce the overhead that is associated with manual provisioning  
2 processes. Additionally, the error rate associated with manual activation will be reduced  
3 significantly as well.

4 Of course, an ICP must be successful in obtaining customers and also capable of  
5 adequately servicing those customers at a competitive price. Historically,  
6 telecommunication service customers dealt with a single ILEC that was responsible for  
7 all aspects of the customers needs, including service interruptions. ICPs are in the  
8 difficult situation of dealing with customer demands for single point service contact while  
9 bundling services from multiple telecommunication providers. When a customer reports  
10 interruptions in service, an ICP must determine which service provider or providers are  
11 involved and "decompose" the trouble sources thereby identifying sub-components and  
12 their ownership. Next, the ICP must initiate trouble ticket controls, which refer trouble  
13 reports/work steps systems/organizations involved in testing and repair of the service  
14 impairment. The referrals then need to be monitored closely, through closeout of the  
15 impairment.

16 Once repaired, the ICP must ensure that any rebate or credit defined by contractual  
17 relationships is honored by the billing system when the report is closed. Finally, it is  
18 advantageous for the ICP to maintain a history of service failures in order to determine  
19 the areas in which it needs to improve, as well as how well and how quickly it responds  
20 to customer situations.

21 In order to stay competitive, ICPs typically use a hybrid network with the ICP  
22 providing only a portion of the network equipment. As a result, an ICP may have  
23 multiple trading partners that fulfill different components of their network offerings. The

1 ICP may own some pieces required to service the customer, such as a local switch, while  
2 they may lease others, such as the local loop. Finally, they may need to resell certain parts  
3 of a convergent order, such as a cable or wireless portion, from wholesalers or other  
4 trading partners. Components owned by the ICP are termed "on-net", while leased  
5 components or resold services are termed "off-net."

6 Depending upon the technology available for a customer's location and the  
7 components available from the ICP, an optimal mix of on-net and off-net resources are  
8 selected. This selection process is key to an ICP's ability to offer competitively priced  
9 services. Manual selection of the optimal mix is expensive and prone to errors. As a  
10 result it is desirable that an ICP use an automatic means of selecting the optimal mix of  
11 components to fulfill a customer's service requirements.

12

#### 13 SUMMARY OF THE INVENTION

14 The present invention is a system and method for retrieving customer service  
15 records and preparing sales proposals from these records. It is an object of the present  
16 invention to automate the sales proposal cycle for integrated communication providers  
17 (ICP).

18 It is a further object of the present invention to incorporate present customer  
19 service into sales proposals by parsing and interpreting customer service records (CSR)  
20 that are electronically retrieved from incumbent local exchange providers (ILEC) and  
21 communications trading partners.

22 It is a further object of the present invention to utilize an optimization algorithm  
23 to select preferred sub-model components for a given sales proposal.

1 It is yet another object of the present invention to provide an automated means to  
2 aid an ICP in providing single point-of-contact for its customers' service interruptions.  
3 Such aid decomposes a customer service into on-net and off-net components with  
4 appropriate contacts for receipt of trouble tickets.

5 One embodiment of the invention comprises a system for supporting the  
6 management of an ICP including a computer processor means for inputting and  
7 processing information necessary to the management of an ICP as well as hosting a  
8 gateway and graphical user interface. The gateway, comprises a means of transferring  
9 information to and receiving information from telecommunication service providers,  
10 preferably in an electronic format such as electronic data interchange (EDI), more  
11 preferably in conformance to order and billing forum (OBF) requirements, and further  
12 preferably provides validation checking of transmissions in conformance with local  
13 service ordering guidelines and access service ordering guidelines established by  
14 telecommunications providers.

15 The processing of information comprises software instructions grouped into a  
16 pre-order management component, a service management component, a design  
17 management component and a circuit management component.

18 The pre-order management component comprising an automatic means of  
19 retrieving customer service records from telecommunication service providers and  
20 parsing said customer service records into reports containing equivalent ICP services.  
21 The service management component comprises an automatic means of creating and  
22 tracking work plans that are comprised of a set of work activity events for performing

1 installation or troubleshooting of each sub-model component of a telecommunications  
2 service provided by the ICP to a customer.

3           The circuit management component comprising a means of automatically creating  
4 a hierachal list of ICP on-net circuit assignments and a means of automatically creating a  
5 cutover work plan for service provisioning and activation. The circuit management  
6 component further comprises an automatic means of receiving requests from trading  
7 partners of the ICP; such requests from trading partners are either rejected or inserted into  
8 said hierachal list.

9           The design management component comprises a means for automatically  
10 selecting a communications service or network model, preferably using an optimizing  
11 algorithm; decomposing said service model into sub-model components and creating a  
12 communications design therefrom. It further comprises a means of automatically issuing  
13 service requests to ICP trading partners.

14           In a further embodiment of the invention, the computer processor is replaced with  
15 a hosting processor further comprising a processing means, hosting of a gateway,  
16 graphical user interface and network connectivity means such as a connectivity means to  
17 a local area network, Internet, intranet, wireless network, or wireless local loop network.  
18 Preferably the hosting processor utilizes hypertext markup language for its graphical user  
19 interface displays.

20           Another embodiment of the present invention provides a system for managing  
21 sales proposals of an ICP including a computer processor means for inputting and  
22 processing information necessary to the management of an ICP as well as hosting a  
23 gateway and graphical user interface. The gateway, comprises a means of transferring

1 information to and receiving information from telecommunication service providers,  
2 preferably in an electronic format such as electronic data interchange (EDI), more  
3 preferably in conformance to order and billing forum (OBF) requirements, and further  
4 preferably provides validation checking of transmissions in conformance with local  
5 service ordering guidelines and access service ordering guidelines established by  
6 telecommunications providers.

7 The processing of information comprises software instructions grouped into a  
8 pre-order management component, a service management component, a design  
9 management component and a circuit management component.

10 In a further embodiment of the invention, the invention provides a system for  
11 managing sales proposals of an integrated communications provider, hereinafter an  
12 integrated communications provider is referred to as an ICP, said system for managing  
13 sales proposals of an ICP comprising:

14 a computer processor means for inputting and processing information necessary to  
15 the management of an ICP;

16 a gateway means of transferring information to and receiving information from  
17 telecommunication service providers;

18 a pre-order management component comprising an automatic means of retrieving  
19 customer service records via hypertext markup language (HTML), electronic data  
20 interchange (EDI) and common object request broker (CORBA) protocols, from  
21 telecommunication service providers and parsing said customer service records into  
22 reports containing equivalent ICP services;

- 1        a design management component comprising a means for automatically selecting
- 2        a communications service model; decomposing said service model into sub-model
- 3        components and creating a communication services sales proposal therefrom;
- 4            wherein subsequent versions of said sales proposal are automatically created
- 5        subsequent to a request from a human operator for alternate communication service
- 6        models.

## BRIEF DESCRIPTION OF THE DRAWINGS

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9      **Figure 1** schematically illustrates a process diagram of the system of the present  
10     invention;

11 **Figure 2** schematically illustrates the Pre-Order Management component of the present  
12 invention;

13 **Figure 3** schematically illustrates the Service Management component of the present  
14 invention;

15 **Figure 4** schematically illustrates the Circuit Management component of the present  
16 invention;

17 **Figure 5** schematically illustrates the Design Management component of the present  
18 invention;

19 **Figure 6** schematically illustrates an embodiment of the present invention adding the  
20 feature of network access.

1      **Figure 7** schematically illustrates an embodiment of a sales proposal cycle utilizing the  
2      present invention;

3      **Figure 8** schematically illustrates an embodiment of a Network Model Management  
4      System of the present invention.

5  
6      DETAILED DESCRIPTION OF THE INVENTION

7            The present invention comprises a system useful to integrated communications  
8      providers (ICPs) and resellers of ICP services for providing sales proposals based upon  
9      customer service records. As used in this description, the following definitions apply:

10     **ANSI**--American National Standards Institute --United States-based organization that  
11    develops standards and defines interfaces for telecommunications.

12     **ASR** -- Access Service Request -- A request for service covered under the FCC's access  
13    tariffs, as described by Order and Billing Forum.

14     **ATM**--Asynchronous Transfer Mode--An international ISDN high-speed, high-volume,  
15    packet switching transmission protocol standard. ATM uses short, uniform, 53-byte cells  
16    to divide data into efficient, manageable packets for ultra-fast switching through a high-  
17    performance communications network.

18     **CLEC**-- Competitive Local Exchange Carrier

19     **CORBA**-- Common Object Request Broker Architecture--an architecture neutral, object  
20    oriented client-server solution. With CORBA you can abstract an object by its services  
21    and publish these using the IDL (Interface Definition Language). A client can then  
22    connect to and use these services.

1   **CMIS/CMIP**-- Common Management Information Services and Protocol--international  
2   standard for network management protocol.

3   **CSR**-- Customer service record

4   **DSL**--Digital subscriber line--allows broadband communication services over copper  
5   telephone lines

6   **DD**--Due Date--The date in which a communication service request is scheduled to be  
7   completed.

8   **DLR**-- Digital Line Request -- Request for digital communication services.

9   **EDI**--Electronic data interchange--An industry standard (ANSI X12, X.400) for direct  
10 computer-to- computer information exchange.

11   **FID**--Field IDentifier--Used on service orders that indicates more data will follow. A  
12 label on a service order that prefaces service order information. FIDs are alpha or  
13 alphanumeric codes that identify retained information on an account, indicate physical or  
14 record activity, generate or negate non-recurring charges, specify recurring charges,  
15 document work done by various departments and identify facilities used to provide  
16 service.

17   **FOC**-- Failure of Confirmation -- A form of error message created when a request for  
18 communication services is either not received by or accepted by the services provider.

19   **Frame Relay**--Industry-standard, switched data link layer protocol that handles multiple  
20 virtual circuits using HDLC encapsulation between connected devices.

21   **ICP**--Integrated communications provider

22   **ILEC**--Incumbent local exchange carrier

1   **ISDN**--Integrated Services Digital Network. Communication protocol, offered by  
2   telephone companies, that permits telephone networks to carry data, voice, and other  
3   source traffic.

4   **ISP**--Internet Service Provider-- a company that provides individuals and other  
5   companies access to the Internet and other related services.

6   **IXC**--Inter-exchange Carrier--A carrier authorized by the Federal Communications  
7   Commission (FCC) to provide interLATA, interstate and/or international long distance  
8   communications services; a carrier authorized by a state Public Utility Commission  
9   (PUC) to provide long distance communications service but not local exchange service  
10   within state boundaries. Also referred to as "IC", "IEC", or "IXC".

11   **LATA**--Local Access and Transport Area.

12   **LCC**--Line Class Code--Identifies to the switch a particular class of service. It can be  
13   identified by a USOC, FID, or some combination of the two. The FID would modify the  
14   USOC by qualifying the class of service with specific attributes such as 700/900  
15   blocking.

16   **LEC**--Local exchange carrier

17   **LSR**--Local Service Request --A request for service covered under the Local utility  
18   commission's tariffs, as described by Order and Billing Forum.

19   **LST**--Line and Station Transfer--Rearrangement of outside network facilities to support  
20   service activation.

21   **NAAR** – Network Address Assignment Request -- Request for a network address  
22   assignment such as phone number or Internet protocol addresses (IP address).

23   **OBF**--Order and Billing Forum

1   **POTS**--Plain Old Telephone Service--Basic telephone service for the transmission of  
2   human speech.

3   **SONET**--Synchronous Optical Network-- 1984 ANSI standard for optical fiber  
4   transmission on the public network. 52Mbps to 13.22Gbps. standard for communications  
5   over a fiber optic network.

6   **TN**--Telephone Number--A ten digit number comprised of an area code (NPA), an  
7   exchange (NX), and an extension.

8   **USOC**--Universal Service Order Code--An alphanumeric coding scheme that identifies  
9   products and services that have been ordered by a customer.

10   **VOD**--Video On Demand.

11   **VoDSL**-- Voice over DSL. The ability to carry normal telephone-style voice over a  
12   digital subscriber line (DSL) with POTS-like functionality, reliability, and voice quality.

13   **VoIP**-- Voice over IP. The ability to carry normal telephone-style voice over an IP-based  
14   Internet with POTS-like functionality, reliability, and voice quality.

15   **VPN**--Virtual Private Network --Switched network with special services like abbreviated  
16   dialing. A customer can call between offices in different area codes without having to dial  
17   all eleven digits.

18           As shown in **figure 1**, the invention comprises four major components designed to  
19   automate manual and semi-manual tasks that are performed by ICPs in pursuit of and  
20   providing support and service order management for customers. The Pre-order  
21   management component **20** is used to access a customer service record, develop summary  
22   of services and create sales proposals. The service management component **30** provides  
23   an integrated approach to order and trouble tickets wherein a consistent user interface is

1 provided for both on-net and off-net communication services. The circuit management  
2 component **40** maintains an inventory of ICP owned circuits (on-net asset), their related  
3 equipment and the customer to which any circuit is assigned. The design management  
4 system **50** is used to design new services for customers and issue electronic requests for  
5 services to trading partners. Although depicted separately, all components are seamlessly  
6 integrated to perform as an integrated ICP operations support system (OSS).

7       **Figure 2** illustrates the Pre-order Management component 20 that supports  
8 pre-order functions such as sales proposal generation, customer service record (CSR)  
9 retrieval and analysis. Communication to the incumbent local exchange carrier **3** (ILEC)  
10 is established in a gateway sub-component **2**. This gateway is available directly to all  
11 components of the invention and is depicted on **figures 2, 3, 4 and 5**.

12       The gateway is preferably an OBF and EDI standards compliant interconnection  
13 gateway providing automated electronic access to ILEC and ICP trading partner order  
14 systems. User-definable configuration files are used to compensate for individual ILEC or  
15 trading partner variations to these standards. The gateway allows an ICPs internal order  
16 management system to transfer and share relevant information including customer service  
17 record (CSR) retrieval, order fulfillment requests, and order status updates with ILEC or  
18 ICP trading partner systems. In addition, the gateway preferably handles data translations  
19 for EDI, CORBA, CMIP/CMIS, as well as translating coded information from foreign  
20 systems (including proprietary protocols).

21       More preferably, the gateway provides a validation check to ensure compliance with  
22 basic usage rules contained in Local Service Ordering (LSOG) and Access Service  
23 Ordering (ASOG) guidelines set forth by ILECs.

1 Referring to **figure 2**, Pre-Order component **20** comprises sub-process **201** that  
2 allows an ICP sales representative to initiate CSR retrieval from an ILEC or ICP trading  
3 partners. Once retrieved, the CSR is then “parsed” at sub-process **202**, wherein certain  
4 information contained in product and service codes (universal service ordering codes  
5 (USOC)/feature identifier codes (FID) codes) is summarized and a report of present  
6 customer service is generated at sub-process **203** and displayed to the user at **204**.

7 Similarly, sales proposals are automatically generated at **205** and displayed to the user at  
8 **206**. Sales proposals are generated by selecting from a database of ICP services  
9 comparable to CSR reported services. The generated sales proposals preferably compare  
10 features and costs of ICP provided services in comparison to existing customer received  
11 services. The initial sales proposal is designated version 1.

12 ICP sales representatives are able to revise the sales proposal by issuing  
13 instructions at **207** to add or delete available services. In a preferred embodiment, the  
14 various revisions of the sales proposals are saved electronically as separate versions. This  
15 allows comparison between proposal versions during sales discussions with the customer.  
16 The ICP sales representative selects which proposal to print for presentation to the  
17 potential customer at **210**.

18 Another feature of the pre-order component is the ability to validate requested  
19 services against availability of those services as well as reserving telephone numbers and  
20 IP addresses at sub-process **209**. Validation also occurs during CSR retrieval and parsing,  
21 when the codes received from the ILEC are validated against validation tables (for  
22 example, USOC, switch, equipment, LATA information etc).

1        Additionally, the pre-order component automatically creates service orders at **211**  
2        from accepted sales proposals. The service orders are then routed to the service  
3        management component **30** and design management components **50**.

4        **Figure 3** illustrates the Service Management **30** component of the invention. In  
5        general, the Service management component is useful in managing the implementation of  
6        new service to customers, revisions to customer services and resolving service  
7        interruptions. The successful ICP is often required to provide single point of contact to  
8        the customer. A customer may inquire as to service interruption **304**, status report **310**, or  
9        recent bill **312**.

10       In the event of service interruption, a trouble report is issued at **304** that creates a  
11       trouble ticket **305**. The service management component accesses an internally stored  
12       customer file to identify which assigned communication circuit or circuits are suspect at  
13       sub-process **306**. The service management component accesses the circuit management  
14       component **40** that decomposes the suspect circuit at **307** into its on-net and off-net assets  
15       and identifies the responsibilities for repair of each asset at **308**, termed work events. The  
16       service trouble ticket is then converted into a service work plan **309** which requests repair  
17       services from the appropriate service group of the ICP via the circuit management  
18       component **40** or via the gateway **2** to for example an ICP trading partner **4** or ILEC **3**.

19       All service work plans comprise a status field or fields. These fields are updated  
20       as identified events on the plan are completed. For example, a work plan may include  
21       service personnel from the ILEC traveling to the customer premises to inspect suspect  
22       interface gear or broken wiring as well as ICP performing network transmission tests.

1      The work plan would then contain two identified events, each of which has a status field  
2      that is updated as the work is performed.

3            For new ICP customers, the service work plans are created from the accepted  
4      customer sales proposal created by the pre-order management component **20**. The sales  
5      proposal identifies the quantity and location of different communication products **301** the  
6      customer has ordered from the ICP and requests appropriate service models **302**. The  
7      service management component retrieves a service model for each communication  
8      product, based in part, upon the location and ILEC or ICP trading partner involved. The  
9      design management component **50** is automatically accessed to decompose the service  
10     model into individual work events at **303**. Service work events are identified **308** and a  
11     service work plan is then created and comprises the sum of all of the work events **309**.

12           The service management component treats service work plans created from a  
13     trouble ticket or an accepted sales proposal in the same manner. As a result, the status of  
14     new customer services is tracked and can be retrieved at any time. When a new service is  
15     functioning properly, a "complete order" notification **314** is automatically transmitted to  
16     the ICP's billing system **60** and charges for the service to the customer is initiated.

17           Customers often inquire as to interpretation of bills they receive from the ICP.  
18      The service management component allows ICP personnel to make a bill inquiry **312** to  
19     access customer information and recent customer billing at **313**. Such bills are stored by  
20     customer account number for rapid retrieval.

21           **Figure 4** illustrates the Circuit Management component **40** of the invention. This  
22      component maintains an inventory of ICP owned circuits (on-net asset) and the customer  
23     to which any circuit is assigned. A data line request (DLR) **409** is received either from a

1 trading partner **4** or from the design management component **50**. For example, during  
2 creation of a sales proposal, the design management component may request a particular  
3 on-net circuit. This request is relayed to the circuit management component for  
4 processing.

5 The DLR is processed by determining if the request conforms to ICP product  
6 offerings at **403**. It is then reviewed to determine if an on-net asset is available to satisfy  
7 the request by creating the required circuit state at **402**. If the on-net circuit is available, it  
8 is placed on reserve in a hierachal list **408**. The purpose of the list is to reserve circuits  
9 based upon criteria such as quality of service requested, availability of alternates, and  
10 source of the request. When two or more individual circuits are to be combined the  
11 design of the combined circuit is confirmed for compatibility. When a requested circuit  
12 or circuit design cannot be satisfied, an error notification **404** is generated and transmitted  
13 to the service management component **30** or to the trading partner **4** via the gateway **2**,  
14 when the trading partner originated the DLR. A separately generated notification  
15 message **410** is used for matching trading partner formats.

16 The circuit management component also comprises a circuit testing means. This  
17 testing means can place any selected circuit into a desired state at **402** and the resultant  
18 data flow through the circuit tested. Testing can be done on an automatic basis with  
19 results reported as a trouble record **407** and transmitted to the service management  
20 component **30**.

21 For new or revised customer services, a cutover request is generated at **407** and  
22 placed into the circuit hierachal list **408**. This cutover request manages both additions  
23 and deletions to circuit assignments.

1 An alternate source of cutover request can occur subsequent to service  
2 interruption or trouble ticket creation **406** by the service management component **30**. In  
3 one embodiment of the present invention, the circuit management component may place  
4 physical groupings of circuits into a "suspect" status when more than 1% error rate from a  
5 member circuit is reported at **406**. This may be initiated from the user directly, or  
6 automatically from trouble history reports **405**. The threshold error rate may be set higher  
7 or lower depending upon the quality of service associated with that circuit. For example,  
8 voice feature lines are able to accept a higher error rate as compared to data transmittal  
9 features. Such errors can also be set to initiate the search for alternate communication  
10 circuits via the link to the circuit creation sub-process **401**.

11 **Figure 5** illustrates the Design Management component **50** of the invention.  
12 Design Management is used to design the optimum mix of on-net and off-net components  
13 to satisfy a customer service requirement. Based upon criteria established by the ICP, a  
14 design proposal is automatically formulated.

15 A request for a circuit design is originated from the service management  
16 component **30**, the pre-order component **20** or by an ICP employee's request **501** via the  
17 processor **1**. The request selects a model for the type of communications service  
18 requested at **502**. An ICP may offer a large number of services. Each of the service  
19 offerings is described in a service model that identifies in sub-model fashion **504**, the type  
20 of service, the interconnections required, distance charges, interface equipment and  
21 software. The ICP employee is allowed to enter a request for a particular service model  
22 **502** at **501** or a particular service sub-model **504** at **503**. The sub-models are compiled  
23 into the complete design at **515**.

1        In order to create and maintain service model, the ICP employee can access a  
2        service model management component **80**. **Figure 8** illustrates one embodiment of a  
3        service model for an example product XYX at **800**. The service model contains  
4        agreements from service providers **801a** through **801d** associated with that product. The  
5        product is further associated with a network model **810** comprising an equipment model  
6        **811**, a transport model **812**, an access model **813** and a control model **814**.

7        Based upon the service model **502** and sub-models **504** selected, the design  
8        management system **50** preferably applies an optimizing algorithm **514**, shown in **figure**  
9        **5** that determines the origin of supply of the various sub-model components. Optimizing  
10      criteria include cost factors, availability, quality of service requested, on-net vs. off-net  
11      services, recurring vs. non-recurring services and trading partner preferences. For  
12      example, one network may be optimized for quality of service, another network  
13      optimized for lowest cost to the ICP and another network optimized to meet trading  
14      partner sales quotas. As a result, the optimizing algorithm provides the important link  
15      between ICP management objectives and resulting network design.

16        From the completed design at **515**, the design management sub-component  
17      automatically decomposes the sub-model components and identifies domains for off-net  
18      components and on-net components at **505**. For off-net components the trading partner is  
19      determined at **506** and appropriate trading partner codes are determined at **507**. On-net  
20      component requests do not require these two intermediate steps. Next the interface and  
21      version are determined at **508** and service request orders are generated at **509**. In general  
22      service request orders include Access Service Request **511**, Local Service Request **512**  
23      and other service requests **510**. Service requests for on-net components are transferred to

1 the circuit management component **40** for processing. Off-net component requests are  
2 then forwarded to the trading partner **4** for confirmation or reservation.

3 One type of service request **509** is the Network Address Assignment Request  
4 (NAAR). A NAAR may require going out to an ILEC or trading partner to reserve and  
5 port a particular phone number or Internet protocol addresses (IP address). The system  
6 will create an OBF standard (ASR/LSR) request to be sent to the trading partner to  
7 acquire the address. The trading partner will either accept the request or issue a failure or  
8 confirmation (FOC) notification **542**. Any FOCs received, are transferred to the service  
9 management component **30** for resolution.

10 For clarity, **figures 2, 3, 4 and 5** depict a single processor **1**. However, a typical  
11 ICP has numerous employees, each of which may require simultaneous use of the  
12 invention. As a result, the invention is preferably used in a client-server arrangement as  
13 illustrated in **figure 6**. A hosting processor **600** operates the management components  
14 and attaches to a system **610** that provides for network connectivity between users **601**  
15 through **604** and the hosting processor. Various forms of network connectivity are  
16 possible including Internet, intranet (including local area network), wireless, and wireless  
17 local loop.

18 When the hosting processor is used in an environment providing intranet or  
19 Internet connectivity it is preferable that compatibility with common web-browsers be  
20 incorporated. For example, if hypertext markup language (HTML) is used, the hosting  
21 processor can be compatible with Microsoft Internet Explorer as well as Netscape.

22  
23

1       EXAMPLE

2           An example of using the invention during a sales proposal by an ICP is illustrated  
3       in **figure 7** and comprises the following:

- 4           1. A request from a sales representative or trading partner of the ICP is received.
- 5           2. Using the Pre-order management component **20**, a request **201a** for the  
6           potential customer's CSR is entered. The Pre-order management component  
7           sends a request through the gateway to the incumbent local exchange carrier  
8           (ILEC) for the CSR.
- 9           3. The Pre-order management component, receives the CSR then parses it at **202**  
10          into recognizable codes and prepares as summary reports: CSR summary  
11          **203a**, Account summary **203b**, Broadband network summary **203c**,  
12          consolidated reports **203d** and cut-over report **203e**. The consolidated reports  
13          feature combines the summaries from multiple customer locations.
- 14          4. The Design management component **50** is then used to analyze further the  
15          CSR summary and select communication service models that satisfy present  
16          customer communication services. The optimizing algorithm **514** available in  
17          the design management selects the preferred sub-model components from the  
18          ICP's on-net product catalog **207c** and off-net trading partner product catalogs  
19          **207b**. The resultant network design and prices are combined into an initial  
20          proposal at **207a**. When multiple customer sites are involved, the invention  
21          preferably creates a consolidated summary of the individual proposals.
- 22          5. The sales representative then reviews the initial proposal and enters revisions  
23          or creates separate versions for comparison **207a**. For example, alternate  
24          versions may be created using different technology choices such as frame relay  
25          or DSL.
- 26          6. The resultant versions of the sales proposal are then presented to the potential  
27          customer for acceptance **211a**. If the proposal is not accepted, the sales  
28          representative can create additional versions of the proposal to present later.

1       7. Once the customer has accepted a sales proposal, the design management  
2           component prepares a cut-over report, confirms availability of sub-model  
3           components, issues appropriate orders for customer communication services  
4           and creates a workplan in the service management component **509**.  
5       8. The service management component **30** is utilized by the sales representative  
6           to track implementation progress and respond to failure of confirmations  
7           (FOC) from ICP trading partners. Alarms are preferably programmed to  
8           notify the sales representative when target completion dates are in jeopardy of  
9           being missed.

10           While the present invention has been described in the context of the preferred  
11           embodiment thereof, it will be readily apparent to those skilled in the art that other  
12           modifications and variations can be made therein without departing from the spirit or  
13           scope of the present invention. For example, a system limited to the modules and  
14           functions identified in **figure 7** is claimed as part of the invention. Accordingly, it is not  
15           intended that the present invention be limited to the specifics of the foregoing description  
16           of the preferred embodiment, but rather as being limited only by the scope of the  
17           invention as defined in the claims appended hereto.